



**Executive Office**  
P.O. Box 942701  
Sacramento, CA 94229-2701  
Telecommunications Device for the Deaf - (916) 795-3240  
(916) 795-3829, FAX (916) 795-3410

April 22, 2008

## **AGENDA ITEM 10**

**TO: MEMBERS OF THE BENEFITS AND PROGRAM ADMINISTRATION COMMITTEE**

- I. SUBJECT:** my|CalPERS Project Update
- II. PROGRAM:** Member and Benefit Services Branch
- III. RECOMMENDATION:** This is an information item.
- IV. ANALYSIS:**

### Background

In June 2007, the first phase of my|CalPERS was launched. The launch created a personalized, secure, and easy-to-use Web site for CalPERS members that allows them to efficiently conduct their business with CalPERS and to complete their financial and health planning activities. The creation of my|CalPERS marked an important step toward becoming an integrated full-service provider for financial and health-related products and services.

### my|CalPERS

In the ten months since its inception, my|CalPERS has phased in new functionalities, features, and enhancements that not only educate our members about our products and services but also provide them with many self-service options. These improvements include allowing our members to view and manage their accounts, profiles, statuses, and statements.

In the latest improvement in February 2008, my|CalPERS incorporated the CalPERS Education Center (CEC). The CEC allows members to enroll in classes online and to take the classes they choose online or in a classroom with an instructor. Between the period of February and March 2008, member enrollments rose 16 percent. As of March 17, 2008, another interactive feature was added to enable CalPERS members who are nearing retirement to make appointments online for one-on-one counseling with a CalPERS retirement expert. Early indications are that this also will be a beneficial feature to members. In just the first 15 days of online appointment availability, 94 individuals scheduled appointments.

### May 2008 Enhancements

On May 4, 2008, we are adding new security measures that will further minimize risk of security breaches when conducting transactions on my|CalPERS. These enhancements will help protect the safety and security of members' personal and confidential data. At the same time, new services are being added to increase the site's benefits.

These improvements require all currently-registered members to re-register for their my|CalPERS account. The process will guide members through the steps to create a stronger new password as well as select a personal security icon and security message. We also have strengthened the process for resetting forgotten passwords to enhance the assurance that the individual who is trying to log in is who they say they are. These safeguards are consistent with industry best practices and similar to those used by banking and other financial institutions' Web sites.

The process should take less than two minutes. Once they have re-registered, members will experience another expanded feature – the ability to view more details about their health benefits, information about all family members enrolled in their plan, and plan-specific alerts about their coverage.

### Communication and Outreach

All currently-registered my|CalPERS members will receive a letter with step-by-step instructions for completing the upgrade to their my|CalPERS account. The letter also details the latest enhancements to the my|CalPERS Health Summary area to help them keep track of their CalPERS health benefits.

The Office of Public Affairs has a comprehensive Communication Plan to educate and inform our members, employers, stakeholders and employees about these changes. Toward that end, CalPERS has mailed an informative letter to every currently-registered my|CalPERS user about the new enhancements. This change is also featured in the latest PERSpective newsletter, issued in April. Further, this information has been sent to employers in a Circular Letter, and to employee organizations in a direct mailing.

### Future Enhancements

In June 2008, CalPERS is scheduled to deliver a series of enhancements to the existing judges' retirement calculators in my|CalPERS. These new features will provide a retirement calculator for the members of the Judges' Retirement System (JRS) and the Judges' Retirement System II (JRS II). Currently, judges

must request their retirement estimates from the Judges' Retirement System staff. The new online calculators will enable judges to quickly access the information they need based on data they enter from their Annual Member Statement.

Future efforts in regard to my|CalPERS will focus on the integration of the system with the Pension System Resumption Project.

**V. STRATEGIC PLAN:**

This item supports the Strategic Plan as follows:

**Goal IV** by designing and developing education and communication initiatives to ensure broad member and stakeholder understanding of CalPERS value.

**Goal VI** by administering pension benefit services in a customer-oriented and cost-effective manner.

**Goal VII** by enabling and educating members and employers to make informed decisions leading to a predictable and secure retirement future.

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Patricia K. Macht  
Assistant Executive Officer  
Office of Public Affairs

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Kathie Vaughn  
Assistant Executive Officer  
Member and Benefit Services Branch